Retiree Membership Instructions

For CA retired chief officers. One retiree per membership. Retiree must have retired from a chief officer rank.

CalChiefs has moved to a new membership and event management software solution beginning with this 20/21 Fiscal Year membership drive called Wild Apricot. The new software solution will allow for a more automated tracking system for both membership and event registrations. You will no longer fill out the old membership invoice form. This new software change will require some new steps on your part to get set up.

Note – if your CalChiefs membership has not lapsed, you have an account in Wild Apricot. If you cannot remember the username and password, contact our office for assistance.

If you already have an account set up with CalChiefs, simply log in and click renew to 07/01/2022, review your profile for any needed updates. You would then either click pay online to pay by credit card or enter in the discount code and ask the system to invoice you for payment by check. See steps 23-24 below for the discount code instructions for payment by check.

If you do not have an account with CalChiefs, here are step-by-step instructions on either joining. Note that required fields are noted with a green asterisk in the online form.

If you need assistance in completing the membership application, feel free to contact our office at 916-923-9455 and our staff will assist you.

1. Go to our website www.calchiefs.org
2. Hover over "join" in the red banner near the top 1/3 of the page.
3. Click on "Membership", which will take you to our membership application webpage.
4. Read the information contained at the top of the page carefully to understand the CalChiefs membership details. Do not click "Log into Membership" if you have not yet created an account in our new software yet. You need to create an account in the new software by completing the appropriate application for the type of membership you qualify for.
5. Scroll down towards the bottom of the webpage
6. Find the instructions for the type of membership tiered membership you qualify or for the individual membership you desire below. Follow the steps carefully for application completion and account/profile set up.
   a. **Tier 1 - 8 memberships** are for active public or private fire departments/districts.
   b. Additional Group Memberships are for adding memberships beyond those included in your tier.
   c. **Volunteer Fire Chief Membership** – Individual membership for the fire chief that comes from a department with an annual budget less than $250,000.
   d. **Retiree membership** is for retired CA chief officers.

e. **Section President** membership is for our section presidents to be members of the parent body.

f. **Associate membership** is for Individuals or agencies engaged in the manufacture or sale of fire service apparatus, supplies or services and others that are interested in the field of emergency fire or medical services. Cash/Check payment discount applied at checkout.

7. Select retiree membership

8. Click "Next"

   1. Enter the email for the retired member. If it says you already have an email in the system, it's because your email was transferred from our old system. If it tells you that, click "log in" and use your email and click forgot password and a link will be sent to you to get into your account. If you don't have a current email in our system, follow the balance of the steps to get into the account.

9. Enter the auto-generated security code in the box marked "code" (this is case sensitive). If you are having trouble reading it, click the speak icon next to the code and it will speak it out for you.

10. Click "Next"

11. Enter the fire department/district's full name that you retired from

12. Enter the retired member's last name

13. Enter the retired member's first name

14. The retired member's email will auto-populate in the email field from your previous entry on the page before

15. Enter the phone number for the retired member. The format for the phone number should be ###-###-####. If your cell is your home phone, enter it here.

16. Enter the cellular phone number for the primary member (optional). Format is ###-###-####

17. You may upload an avatar (picture) of the primary member (optional)

18. Enter the street address for the organization (numbers, street name and suite)

19. Enter the City

20. Select the state

21. Enter the zip code

22. Enter year you retired (optional)

23. Select whether you will be paying for the membership via credit card or cash/check. CalChiefs offers a roughly 3% discount for members paying by cash or check.

24. If you are paying by cash/check, select the discount code for your type of membership you are applying for membership in (e.g. If you are Tier 1 enter the discount code **T1D**). Make sure you enter the 3-digit code exactly as shown in the previous field. Alpha digits are capital letters. If you are paying by credit card leave this field blank.

25. Click "Next"

26. Review and confirm that the level of membership is accurate, and the discount amount will be noted on this page if you are paying by cash or check. The total amount due will be displayed, along with detailed payment instructions.

27. **Before** you click either "invoice me" or "pay online" review the application information at the bottom of the page for accuracy. If you find there is an error, click the "back"

button and make any corrections.

28. Click "Invoice me" if you desire to pay by cash/check. An invoice will be autogenerated and sent to you via the email of the retired member so you can process the payment.

29. Click "Pay Online" if you desire to pay by credit card. The website will take you to the next page to enter in all the related credit card information. Carefully enter al the related details and pay for your membership.

30. If you clicked **"invoice me:"**

You are now done with the primary member's membership initial application. An invoice will be sent to the retired member's email. As well as another email confirming your membership application submittal. In the email regarding your application, it requests you finalize the application by logging into your profile. To do so, click the "log into your profile" link and enter the member's email provided and click "forgot password." An email will be autogenerated and sent to the member's email with a link to reset your password. Once you've logged into your account and complete the following step:

- **IMPORTANT** You will also need to ensure you set your privacy settings in your account to allow us to send you member updates. It defaults to "unsubscribed." If the privacy settings are not updated, you will <u>NOT</u> receive emails from CalChiefs about important updates for our members and current issues, newsletters and events.

It's important to note that all your memberships in your tier will remain in "pending" status until such time as we receive payment for membership dues. Once payment is received and processed, the membership application will be approved by CalChiefs staff and your membership will become active.

31. If you click **"pay online:"**

You will be taken to the page to enter all of your credit card info and make payment for your membership. An invoice and receipt will be automatically emailed to the member's email if the payment is successfully processed. If there is an issue with the credit card processing, an email will be sent to the credit card holder indicating the payment processing was unsuccessful.

You are now done with the retired member's membership initial application. An invoice will be sent to the members email. As well as another email confirming your membership application submittal will be sent, as well. In the email regarding your application, it requests you finalize the application by logging into your profile. To do so, click the "log into your profile" link and enter the member's email and click "forgot password." An email will be autogenerated and sent to the primary member's email with a link to reset your password. Click the link and create your

password and log into your member account and complete the following step:

- **IMPORTANT** While updating your profile, you will also need to ensure you set your privacy settings in your account to allow us to send you member updates. It defaults to "unsubscribed." If the privacy settings are not updated, you will <u>NOT</u> receive emails from CalChiefs about important updates for our members and current issues, newsletters and events.

Please note that your membership will remain in "pending" status until such time as we receive payment for membership dues and approve your application. Once payment is received and processed, the membership application will be approved by CalChiefs staff and your membership will become active. You will receive an email indicating those steps are completed.

You're done!! Thank you for your support of CalChiefs. Watch your email for the remaining notices and enjoy the benefits of CalChiefs Membership.